User Guide

Version 1.1

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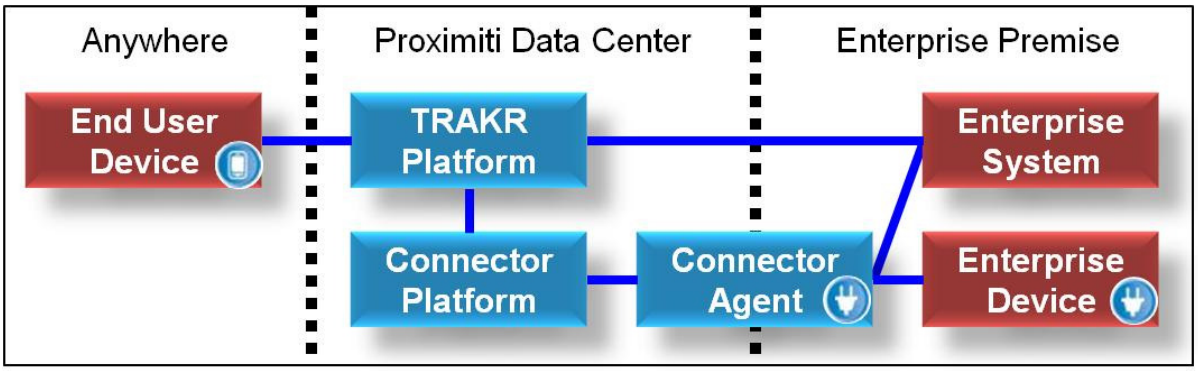
What Is CellTRAKR CRM?

The primary mission of CellTRAKR CRM is to help increase the completeness, accuracy and timeliness of CRM system information. It does this by making it fast and easy to update your CRM system using your mobile device. It also improves mobile access to CRM data. Finally, since it is a member of the TRAKR Series of products, it has the ability to offer a wide variety of other features. Here is a partial list of standard and optional features:

Standard Features	Optional Features
Call Popup	Location Reporting
Text Popup	Safe Driving
Email Popup	Status Reporting
Manual Add	International Calling
Search	Flexible Call Redirect
Contact Add	Roaming Awareness
Calendar	Budget Tracking

Here is an overview of the TRAKR Series Platform used to deliver these features:



The TRAKR Series is a "cloud service" that runs at Proximiti's data center. On one side it connects to personal devices. In the case of CellTRAKR CRM, the device is your smartphone. On the other side, it connects to enterprise system. In the case of CellTRAKR CRM, it connects to your CRM system.

In order to make CellTRAKR CRM work with your smartphone, you need to download the CellTRAKR CRM Phone Client. Once downloaded, this software sits in the background and watches your phone activity. Over time, it learns your habits. For example, it learns about your friends and family so it can ignore communications from/to them. On the other hand, it also learns from your CRM System, so when you are talking to a customer or prospect, at the end of the conversation it will automatically pop up a prefilled form so you can create one or more CRM entries with just a few clicks.

CellTRAKR CRM Phone Capabilities

Your cell phone type will affect what features you can use. We try to avoid this, but it happens because phone vendors make their own arbitrary choices as to what functions they will make available in their operating systems and we are unwilling to "jailbreak" or otherwise modify the phone. Instead, we work with every phone vendor to make sure they understand our needs and, as they make changes, take advantage of them to improve CellTRAKR CRM. Here is an overview of current levels of support:

Feature	Blackberry	Android	Windows 5/6	Windows 7	iPhone
Overall Rating	Good	Good	Good	NA	NA
Minimum OS Level	4.3	2.1	Any	NA	NA
Next Major Release	Fall 2011	Fall 2011	Fall 2011	Fall 2011	Fall 2011
Core CRM Functions					
Call Popup	Yes	Yes	Yes	NA	NA
Text Popup (SMS)	Yes	Yes	Yes	NA	NA
Text Popup (MMS)	No	Yes	No	NA	NA
Email Popup	Yes	No	Yes	NA	NA
Manual Add	Yes	Yes	Yes	NA	NA
Search	Yes	Yes	Yes	NA	NA
Contact Add	Yes	Yes	Yes	NA	NA
Calendar	Yes	Yes	Yes	NA	NA
Other CellTRAKR Functions					
Location Reporting	Yes	Yes	Yes	NA	NA
Driving Mode	Yes	Yes	Yes	NA	NA
Exception Reporting	Yes	Yes	Yes	NA	NA
Status Updates	Yes	Yes	Yes	NA	NA
International Calling	Yes	Yes	Yes	NA	NA
Phone Data Wipe	Yes	Yes	Yes	NA	NA
Flexible Call Redirect	Yes	Yes	Yes	NA	NA
Roaming Awareness	Yes	Yes	Yes	NA	NA

These are subject to change. Your administrator will notify you whenever your phone's capabilities change.

Installing The Phone Client

The installation process varies slightly by phone type. The specific process for your phone can be found in one of these exhibits:

Exhibit 1 – Installing CellTRAKR on Android Phones

Exhibit 2 – Installing CellTRAKR on Blackberry Phones

Exhibit 3 – Installing CellTRAKR on Windows Mobile 5/6 Phones

Please follow the instructions and install the phone client in the appropriate exhibit before continuing.

CellTRAKR CRM Core Feature Tour

Main Menu

The appearance of the main menu will depend on the features provided to you by your administrator.

Shown at the right is a typical main menu. The first 3 menu items are Core CRM features and the next 3 are optional features. The Settings Menu brings you to the login page as well as gives you the opportunity to see your key settings, which have been assigned to you by your administrator.

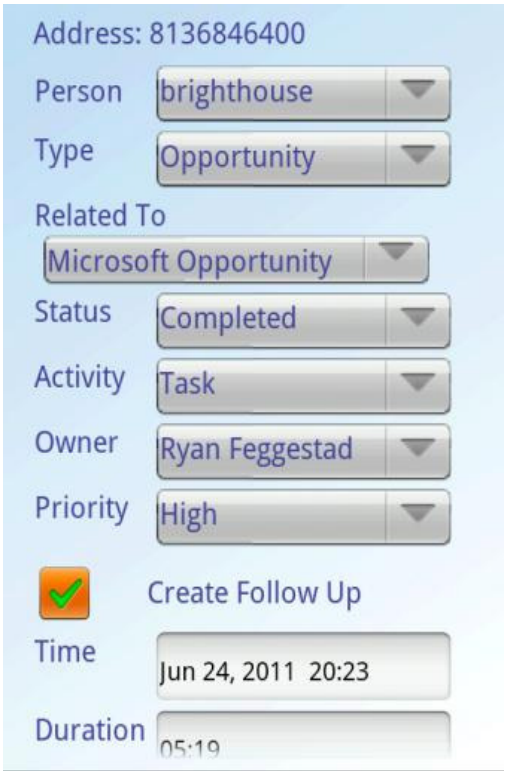
You can click on the CellTRAKR icon any time to get this menu. However, remember that CellTRAKR is always running in the background, even when this menu is not visible.

The Automatic Pop Up

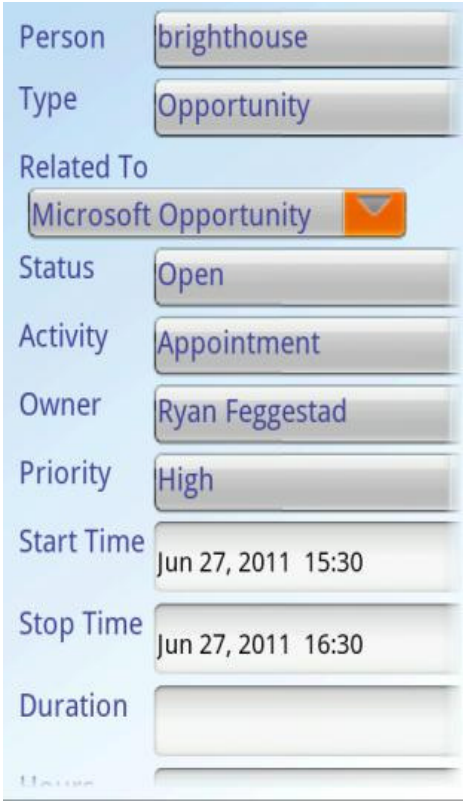
At the completion of every event on your phone, CellTRAKR CRM sends an event record back to the CellTRAKR CRM hosted service. If CellTRAKR CRM thinks the event may be CRM related, it sends back a pop up request, along with a list of suggestions.

When the phone software gets this request it pops up a screen. You can accept the suggestion, look at alternate suggestions, or perform a search to find any CRM entity. You can also add notes and indicate if you would also like to post a follow up item.

Once you are satisfied, you can click “Done” and the information will be posted to your CRM system in minutes. If you are too busy to deal with the event right at that moment, you can also click “Later.”



The Follow Up

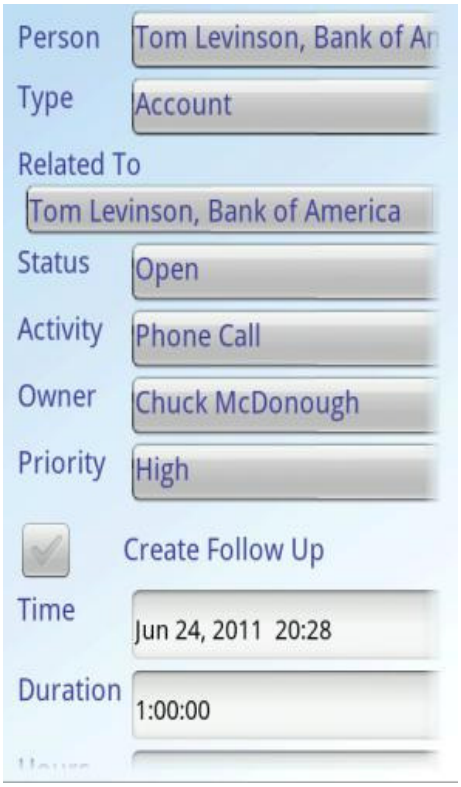


If you checked follow up, another screen is popped up as soon as you hit "Done." It is pre-populated with the same information as was on the original event, but any field can be changed. Note that the owner can also be assigned.

Manual Events

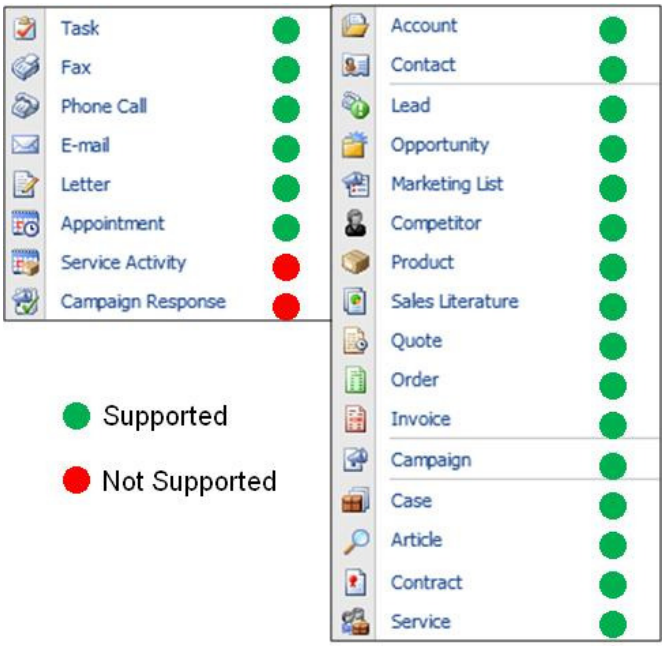
Even if there is not a phone event, you can create an event at any time. Just find the CellTRAKR icon on your phone and click on it. Click on "Add / Update Item." If you have items that you have not processed, you will see a list of them, but you can also elect to create a new item.

You can even use the follow up capability to create a series of items



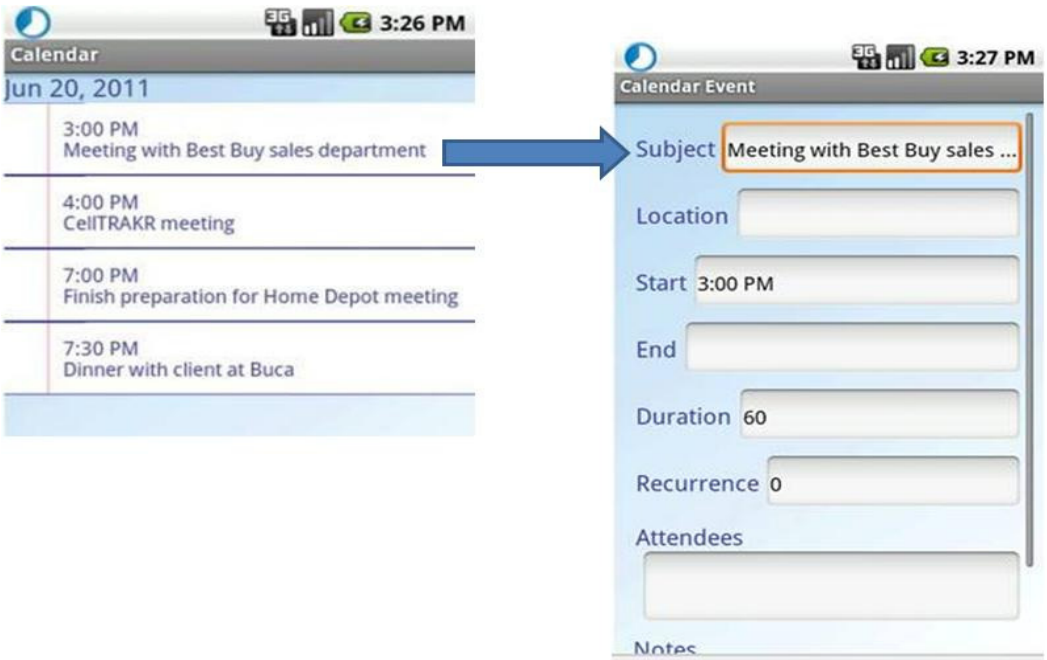
Support For Microsoft Dynamics CRM

CellTRAKR CRM supports most of the standard constructs of Microsoft Dynamics CRM.



Appointments and Tasks

You may also use CellTRAKR CRM to view appointments and tasks. When you click on calendar, you will see a list of today's appointments and tasks. You can switch days. If you click on an individual item, you can get additional detail.

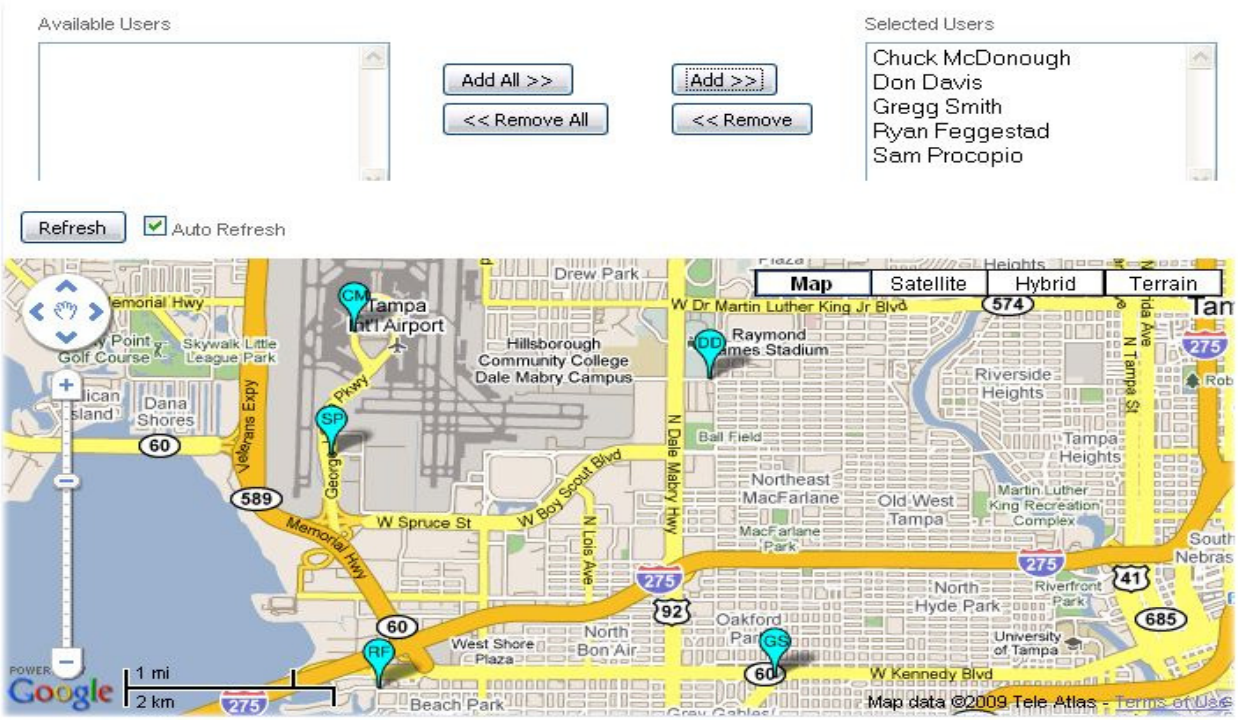


Optional Feature Tour

By default, all optional features are turned off for new CellTRAKR CRM accounts. However, the system administrator has the option of turning on some or all of these features. This can be done by employee type or even at the individual employee level. This section provides a quick overview of the available features. To see which features you have, click on "Settings" on the main menu and then click on "Settings" again to see a detailed list of settings. You are not able to change these settings, so if you desire changes, please consult your system administrator.

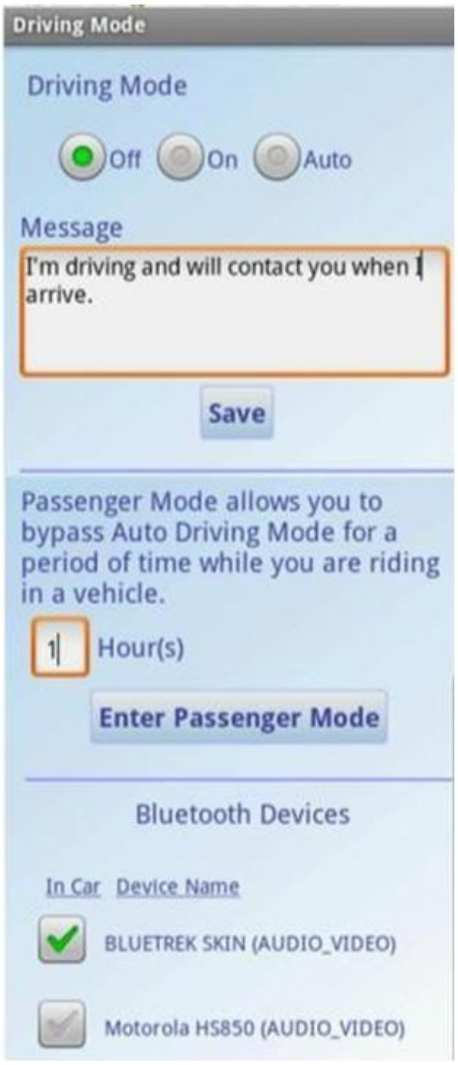
Location Reporting

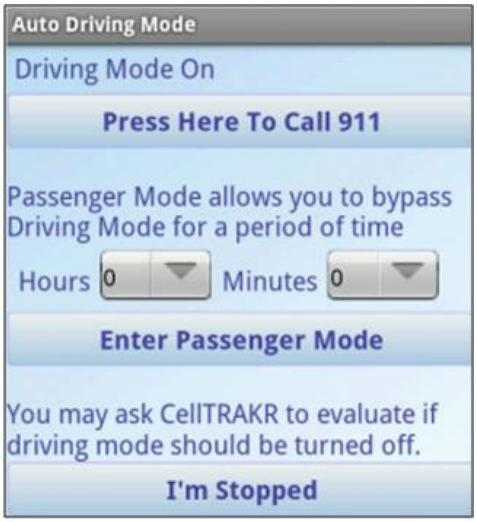
CellTRAKR can report your location at specified intervals and whenever an event occurs. You can also manually submit a location. Administrators can see the location history and also send your phone a location request. There are a variety of uses for this capability, including finding lost phones.



Safe Driving

CellTRAKR has a driving mode that turns all phone sounds off to avoid distractions. It can auto reply to text messages. Hands free calls can be enabled or disabled. It can be made mandatory and function automatically or it can be made discretionary and turned on or off by the user.




Auto Driving Mode
Driving Mode On
Press Here To Call 911
Passenger Mode allows you to bypass Driving Mode for a period of time
Hours
0
Minutes
0
Enter Passenger Mode
You may ask CellTRAKR to evaluate if driving mode should be turned off.
I'm Stopped

Driving mode can also be configured to set a maximum speed limit. Any violations of safe driving rules or circumvention efforts, such as turning off GPS are reported to the relevant administrators.

Status Reporting

The system administrator can define a number of statuses and users can quickly toggle between them, for example, “In Transit,” “At Customer,” “Break,” “Lunch,” “Vacation,” etc. There is no limit on the number of statuses. Each time the status changes CellTRAKR calculates the time spent in the previous status.

International Calling

Making international calls from a cell phone can be very expensive, particularly if you do not have a special plan. CellTRAKR includes an international dialing capability that typically saves around 75% compared to most mobile carrier rates.

To use this feature, open CellTRAKR and click on International Dialing. Next, enter the number to be called. CellTRAKR will call your phone first, and then call the desired number.

Flexible Call Redirect

This capability allows CellTRAKR to automatically redirect calls to cheaper phone numbers. For example, a toll free conference call number may be switched to a local number. An Administrator can enter full or partial phone numbers, and for each phone number enter a message and an optional redirect number. If a number was dialed that met the criteria, we would display the message and automatically hang up and dial recommended number.

Roaming Awareness

CellTRAKR will notify you if you are roaming and warn you that certain charges may be extremely high compared to your normal economics. The goal here is to avoid large unnecessary and embarrassing phone bills.

Budget Tracking

Administrators can set budgets for phone calls, text messages and emails. Both users and administrators can see how usage is tracking to budgets as the month progresses. Activity is posted in real-time rather than 45-60 days later, allowing an "ounce of prevention" rather than the "pound of cure."

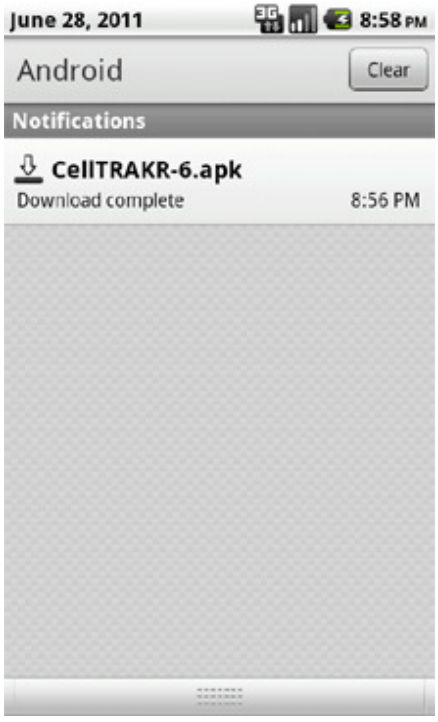
	Minutes	Texts	Emails
Budget	500	500	500
Actual	50	46	1
Used%	10%	9%	0%

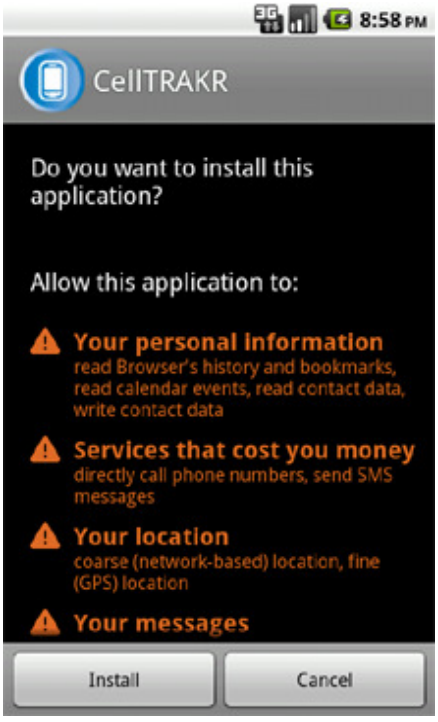
Exhibit 1 – Installing CellTRAKR on Android Phones

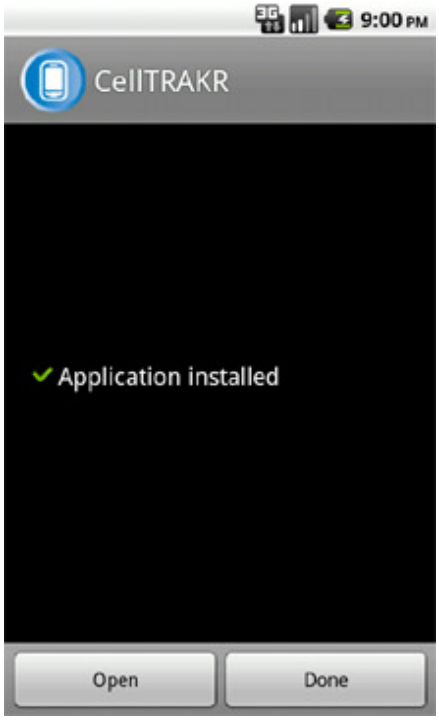
To install CellTRAKR, browse to the following location from your phone or open this document and click on the link:

http://www.proximiti.com/cdr/CellTRAKR.apk

When the installation process begins, follow the steps below which may differ slightly depending on your phone type and OS level.




8:58 PM
CellTRAKR
Do you want to install this application?
Allow this application to:
Your personal information
read Browser's history and bookmarks, read calendar events, read contact data, write contact data
Services that cost you money
directly call phone numbers, send SMS messages
Your location
coarse (network-based) location, fine (GPS) location
Your messages
Install
Cancel



Once installed, open CellTRAKR on your phone and click Login. Enter your username and password on the page displayed below. In some cases this will happen automatically. When you are successfully logged in, you will see the main CellTRAKR menu and are now ready to begin using CellTRAKR!

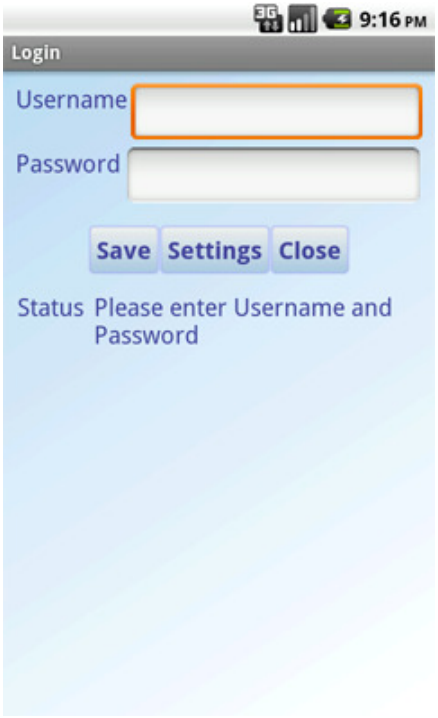
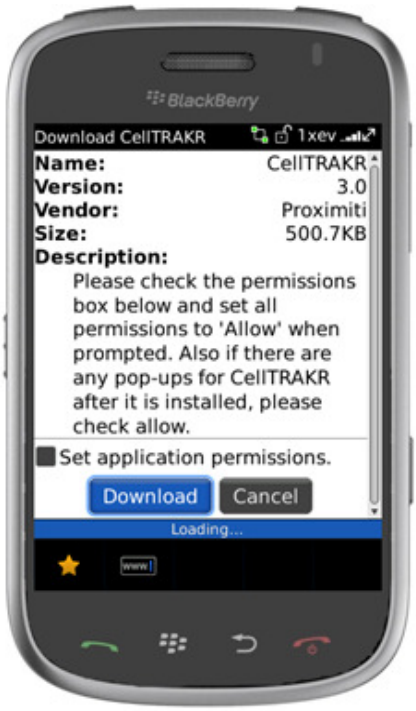


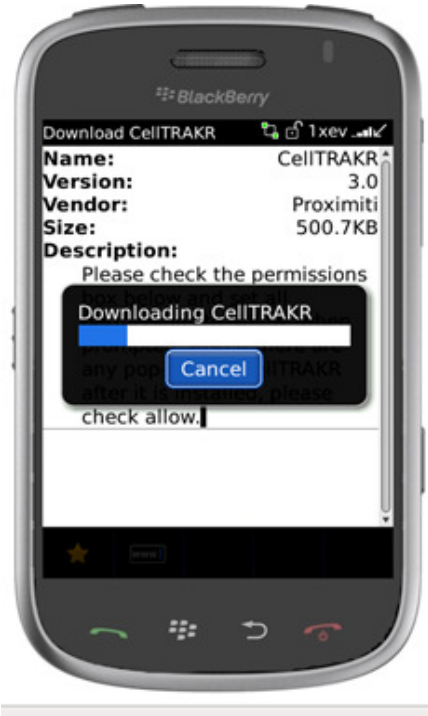
Exhibit 2 – Installing CellTRAKR on BlackBerry Phones

To install CellTRAKR, browse to the following location from your BlackBerry phone or open this document and click on the link:

http://www.proximiti.com/cdr/installer/CTInstaller.jad

When the installation process begins, follow the steps below which may differ slightly depending on your phone type and OS level.





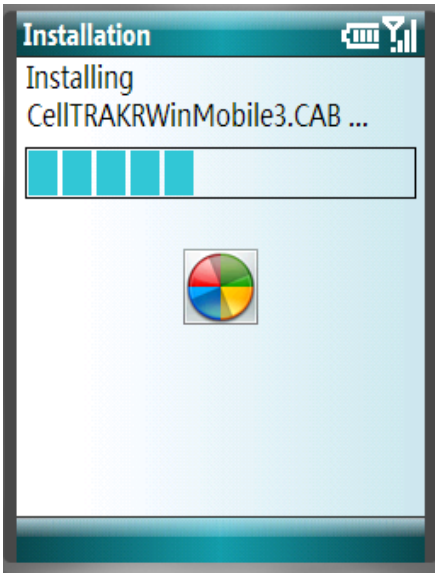
Once installed, open CellTRAKR on your phone and click Login. Enter your username and password on the page displayed below. In some cases this will happen automatically. When you are successfully logged in, you will see the main CellTRAKR menu and are now ready to begin using CellTRAKR!

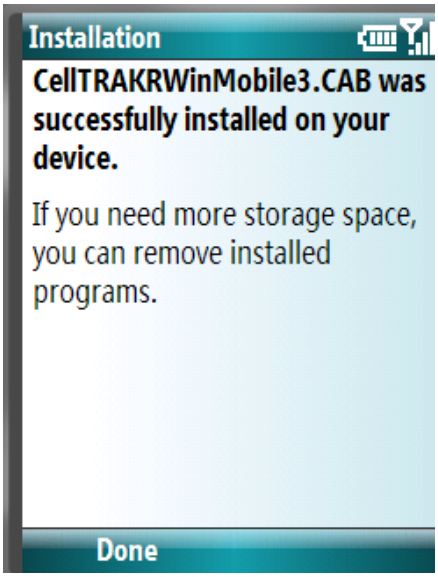
Exhibit 3 – Installing CellTRAKR on Windows 5/6 Phones

To install CellTRAKR, browse to the following location from your BlackBerry phone or open this document and click on the link:

http://www.proximiti.com/cdr/CellTRAKRWinMobile3.cab

When the installation process begins, follow the steps below which may differ slightly depending on your phone type and OS level.




Installation
CellTRAKRWinMobile3.CAB was successfully installed on your device.
If you need more storage space, you can remove installed programs.
Done

Once installed, open CellTRAKR on your phone and click Login. Enter your username and password on the page displayed below. In some cases this will happen automatically. When you are successfully logged in, you will see the main CellTRAKR menu and are now ready to begin using CellTRAKR!